TORONTO

This bulletin summarizes the highlights of the 2012 City of Toronto annual Employment Survey, marking its 30th consecutive year.

This information resource presents a picture of change in Toronto's economy throughout the past three decades.

For more information, please visit us at www.toronto.ca/demographics/surveys

profile TORONTO

February 2013

Toronto Employment Survey 2012

Highlights

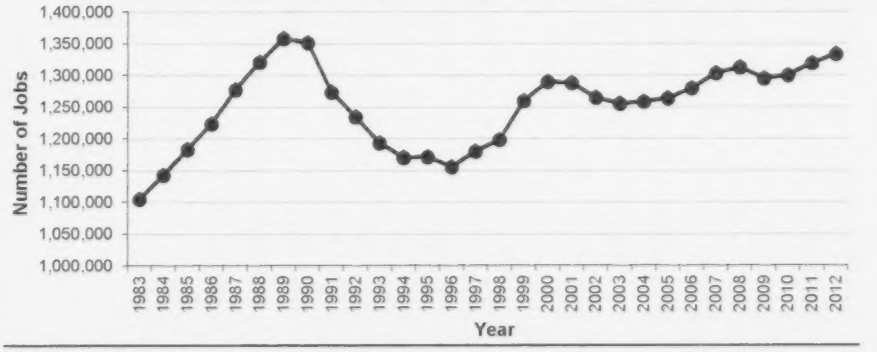
- Toronto's overall employment in 2012 was 1,331,600, up by 1.1% or 14,300 jobs from 2011, matching the national rate of employment growth of 1.0% and outpacing the Ontario rate of growth of 0.5%. The number of establishments was down by 500 or 0.7% to 74,600.
- Full-time employment has continued to stay above the 1 million mark for the sixth straight year with 1,028,900 employed full-time. This is a 0.5% increase in full-time employment from 2011 while part-time employment grew faster with a 3.3% increase over the past year.
- The largest share of jobs is found in the Office sector (47.9%), followed by the Institutional (16.4%), Service (11.9%), Retail (10.8%) Manufacturing (9.6%) and Other sectors (3.4 %), reflecting the diverse nature of the Toronto economy.
- Employment increased in the Office, Service, Institutional and Other sectors. The Office sector had the greatest growth, adding 10,200 jobs since 2011, while the Other sector had the greatest relative growth at 3.0% over 2011.
- Employment in the Downtown and Centres has grown by 7.3% or 35,900 jobs since 2007; 31,600 jobs were added to the Downtown (7.6%) and 2,400 jobs were added in Scarborough (18.5%). North York Centre has almost half (46.3%) of the 77,900 jobs in the Centres.
- Some 3,400 business establishments were new to the City in 2012. The Office sector continues to dominate with 40.6% of all new establishments, comprised primarily of law offices, parole/security services and health service practitioners. The Service and Retail sectors were also well represented, comprising 26.7% and 18.6% of new establishments respectively.
- Of the 3,400 new establishments, 54.5% are located within the Downtown, Centres and Employment Districts, down from the 57.4% observed in 2011.

1. Overview

This bulletin summarizes the results of the 2012 Toronto Employment Survey, by highlighting the key findings and trends pertaining to employment by sector, the longevity of establishments, and emerging patterns in the Centres, Downtown and Employment Districts. The results from the Employment Survey are used to gauge the City's economic and investment health and to monitor the progress of the Official Plan policies. It also is used in proactive policy development for decision making, as an aid in labour force development efforts, and to provide background information for forecasting and the planning of City infrastructure and services. This annual survey offers timely insight into the business climate across Toronto to facilitate, accelerate and achieve economic growth.[1] Toronto's 30th Employment Survey was undertaken in the summer of 2012.

The Survey's findings indicate that Toronto's economy has performed well over the past year. The recovery from the impacts of the global recession continues, with employment topping 1.3 million jobs and the net addition of 14,300 jobs in the last year alone (see Figure 1). The City experienced a 1.1% increase in employment this past year, exceeding Canada's growth of 1.0% and Ontario's growth of just 0.4%. The growth of the City's Gross Domestic Product (GDP) has expanded from 1.8% in 2010/11 to 2.8% in 2011/12. Total median hourly wages rose by 4.0% between 2011 and 2012.[2] These numbers, while seemingly modest, are quite robust in a current global environment of countries defaulting on their debt and facing massive current unemployment and with further cuts in spending anticipated to come.

Figure 1: Toronto Employment, City of Toronto, 1983-2012



[1] All data in this Bulletin are from the Toronto Employment Survey unless otherwise indicated.

[2] Toronto Economic Development & Culture, *Economic Indicators August 2012*. August 2012.

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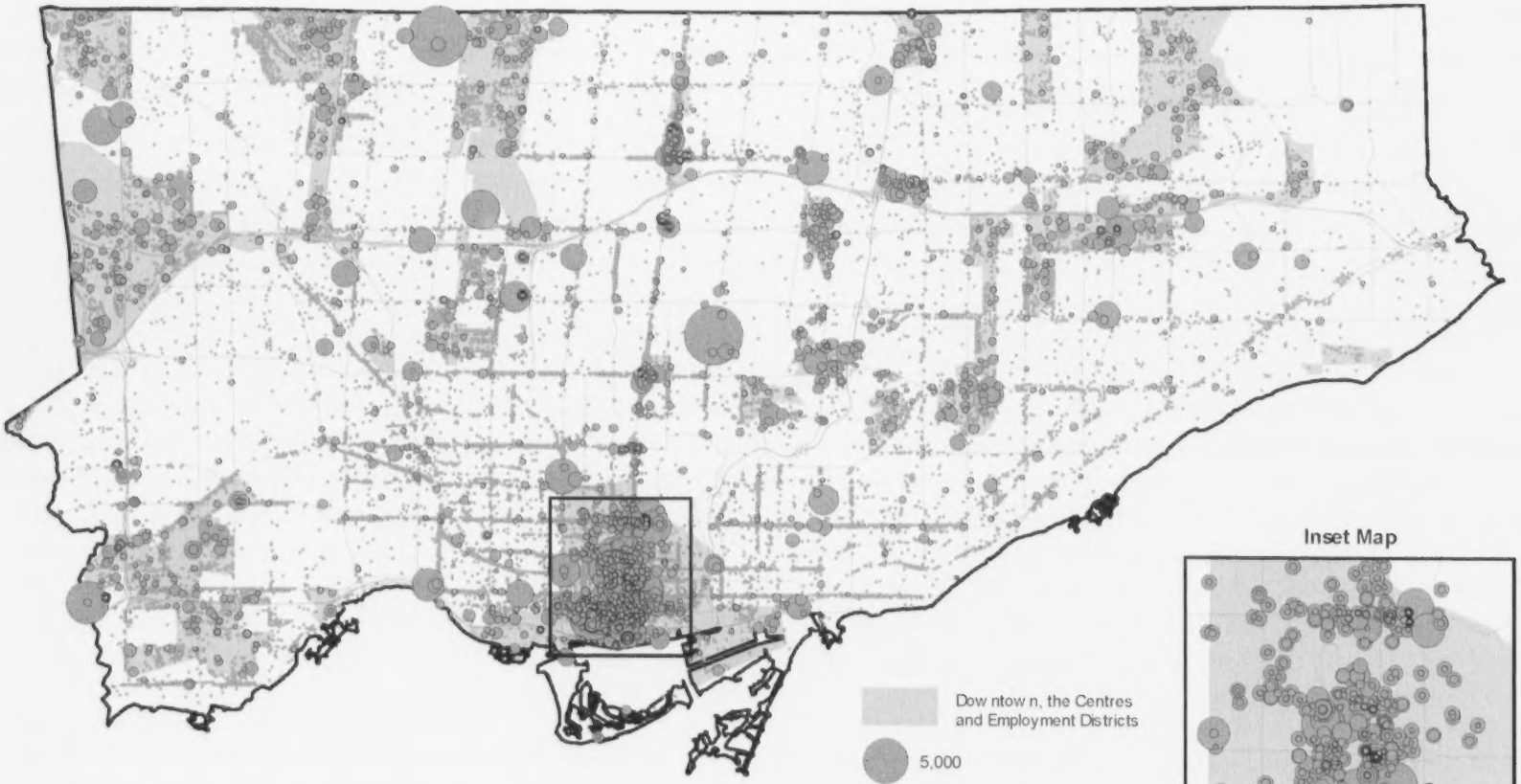
Map 1: 2012 Employment Concentration, City of Toronto



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Map 1 shows the distribution of employment across the City, with distinct concentrations in the Downtown, Centres and Employment Districts, demonstrating their continued vitality.

Over the past decade, the City's total employment has gradually risen, up 68,300 or 5.4% since 2002 (see Table 1). Full-time employment has shown a significant increase of 3.23% or 32,200 jobs. Part-time employment grew by 13.54% or 36,100 jobs. Over the last 10 years 47% of all jobs created were full time. In 2012, one in every three jobs created were full time. Currently, more than three quarters of all employment in the City of Toronto is classified as full time or 77.3% of all employment. In 2012, part-time employment grew by 1.1% while full-time employment grew by 0.5%.

2. Employment by Sector

2002-2012

Over the decade there have been notable changes in the sectoral composition of Toronto's economy. The Office sector has maintained its dominance over the last decade. This sector has grown by 56,600 jobs, growing 9.7%. The Office sector accounts for 47.9% of all employment in the City, nearly half of all jobs. The Institutional sector is the second largest employment sector in Toronto, representing 16.4% of all employment in the City. This sector grew by 19.1% or 35,100 jobs (see Figure 2 and Table 2).

The greatest rate of increase occurred in the 'Other' sector; the City's smallest sector. The 'Other' sector includes entertainment venues, community and recreation uses. This sector increased 40.86% or by 13,100 jobs over the decade representing 3.4% of total employment in 2012.

By contrast, the Manufacturing sector continues to decline, transforming from what was once Toronto's second *largest* employment sector into Toronto's second *smallest* sector. This sector has shrunk from 180,000 employees in 2002 to 128,200 employees in 2012. The Manufacturing sector represents 9.6% of total employment in 2012.

The Service sector is primarily made up of restaurants, auto-related uses and accommodation. This sector grew from 142,500 in 2002 to 158,300 in 2012, while its relative share of total employment remained constant at around 11.9%. Retail sector employment saw a slight decline of 600 jobs or just 0.4% over the decade. The Retail sector accounts for 10.8% of employment in the City with 143,300 jobs.

Table 1: Total Employment, 2002, 2011, 2012

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Annual Growth
	2002	2011	2012	2002-2012		2011-2012	
Full-time	996,700	1,024,200	1,028,900	32,200	3.2%	4,700	0.5%
Part-time	266,600	293,100	302,700	36,100	13.5%	9,600	3.3%
Total	**1,263,300**	**1,317,300**	**1,331,600**	**68,300**	**5.4%**	**14,300**	**1.1%**

** Numbers have been rounded to the nearest hundred.*

Figure 2: Sectoral Changes Over Time, 2002, 2007, 2012

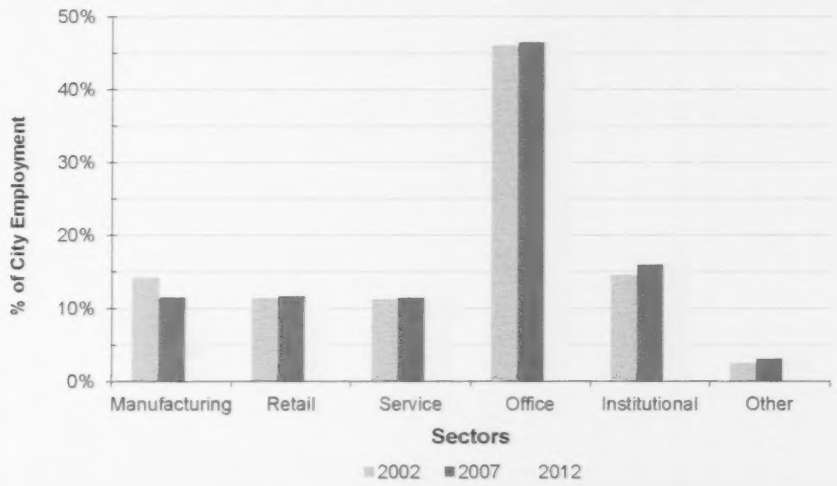


Table 2: Employment by Sector

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2002	2007	2011	2012	2002-2012		2007-2012		2011-2012	
Manufacturing	180,000	149,200	128,600	128,200	-51,800	-28.8%	-21,000	-14.1%	-400	-0.3%
Retail	143,900	151,500	141,600	143,300	-600	-0.4%	-8,200	-5.4%	1,700	1.2%
Service	142,500	148,900	155,500	158,300	15,800	11.1%	9,400	6.3%	2,800	1.8%
Office	581,500	604,200	627,900	638,100	56,600	9.7%	33,900	5.6%	10,200	1.6%
Institutional	183,300	207,800	219,800	218,400	35,100	19.1%	10,600	5.1%	-1,400	-0.6%
Other	32,100	40,000	43,900	45,200	13,100	40.8%	5,200	13.0%	1,300	3.0%
Total	**1,263,300**	**1,301,600**	**1,317,300**	**1,331,500**	**68,200**	**5.4%**	**29,900**	**2.3%**	**14,200**	**1.1%**

** Numbers have been rounded to the nearest hundred. Totals may differ from sum of full-time and part-time employment.*

2007-2012

In the last five years, the Office sector has continued its steady increase from 604,200 employees in 2007 to 638,100 employees in 2012, an increase of 33,900 or 5.6%. Retail employment has been trending downward somewhat for the last five years with a decrease of 5.4% or 8,200 jobs since 2007. The Manufacturing sector has continued its decline with a loss of 21,000 jobs or 14.1%. All other sectors have showed a steady increase since the economic downturn, demonstrating a consistent recovery despite the harsh economic climate.

2011-2012

In 2012, all six sectors of employment in the City of Toronto remained stable. All sectors experienced a change of less than 2% except for the 'Other' sector which saw an increase of 3% (see Figure 3). The Office sector remains the largest source of employment in Toronto representing 638,100 jobs, up 10,200 jobs from last year or 1.6%.

The Retail and Service sectors saw modest increases of 1.2% and 1.8% respectively. The Institutional sector saw the greatest loss of employment with 1,400 jobs lost or 0.6%. The manufacturing sector continues its downward trend this year with a modest loss of 400 employees or 0.3%.

3. Number of Establishments

Since last year's high of 75,100 establishments, the number of establishments surveyed in 2012 has decreased by 500 businesses to 74,600 business establishments (see Figure 4). While the number of establishments declined slightly by 0.7% in 2012, employment in the City of Toronto has grown by 14,300 jobs in that time or 1.1%.

The Manufacturing sector grew a modest 100 establishments over the last year (+1.9%). The number of Manufacturing establishments has stabilized alternating between 5,100 and 5,200 over the last five years. Manufacturing employment has seen a consistent downward trend over the last 10 years reflecting a similar decline nationally as the North American economy has continued to shift from a goods-producing economy to a service-based economy. Toronto's progression reflects an evolving urban economy which remains competitive in a changing regional and global market. Nevertheless, the rate of loss of Manufacturing employment in Toronto has begun to slow since the economic downturn of 2008, demonstrating a continuing demand for Manufacturing activities in the City. Still a centre of opportunity and industrial innovation, 3.8% of establishments new to the City in 2012 reside in the Manufacturing sector.

In the last decade, the Office sector has steadily increased its number of establishments, growing by 1,400 establishments or 5.1% over the last decade. The number of establishments in the Office sector has fallen slightly in the years following the 2008 economic dip. The sector regained its momentum in the last two years, growing by 800 establishments or 2.9% and restoring the number of establishments back to its 2007 high point. In the last five years, the Office sector has experienced slight peaks and valleys in its number of establishments. This is due in part to the merging of small and medium-sized office firms to remain competitive during leaner economic times. In 2012, the office sector grew by just 100 establishments or a modest 0.3% over the previous year.

Figure 3: Change in Total Employment by Sector, 2011-2012

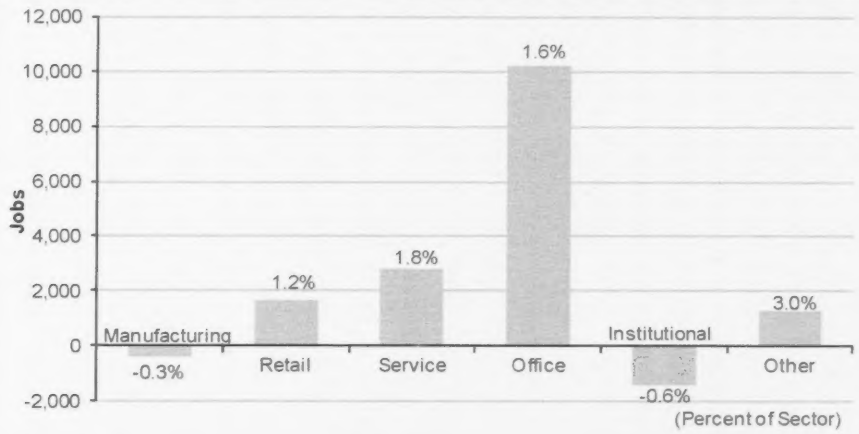
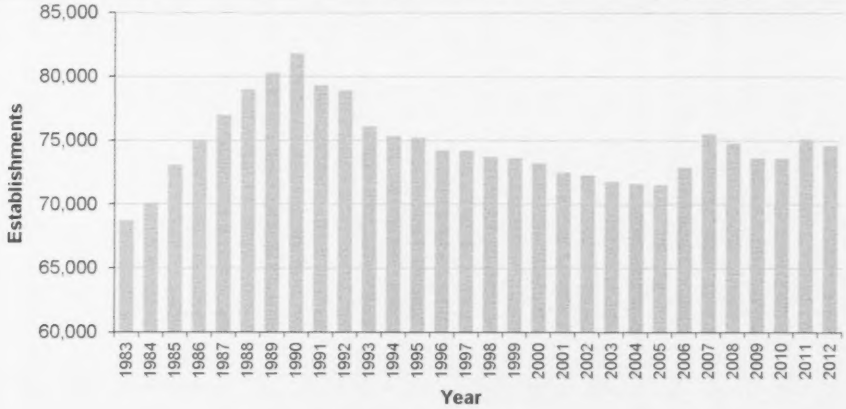


Figure 4: Total Number of Establishments, 1983-2012



The Retail sector has lost 1,600 establishments in just five years, declining from 17,300 establishments to 15,700, a loss of 9.2% (see Figure 5). This past year, the Retail sector lost 300 establishments, shrinking 1.9%. In 2002, an average Retail store employed 8.3 employees, whereas in 2012, 9.1 employees were employed. The continued growth of larger retail formats continues to reduce the overall number of Retail establishments in the City.

The Service sector has grown by 1,300 establishments since 2002, totaling 17,900 establishments in 2012 and grew by 7.8% over the last decade. In the last year, this sector has remained stable with a modest increase of 0.6%, adding just 100 new establishments to the sector.

Despite the unsettled global economic conditions, Toronto remains an attractive place for new start-ups and relocations from elsewhere. This year, businesses that were established in the City within the past 5 years comprised the largest proportion of establishments by length of tenure at 26,400 or 35.4% of total establishments. This is a small increase over 2011 (see Figure 6). The proportion of establishments in the same location for 5 years or less has declined since 2007 from 39.8% in 2007 to 35.4% in 2012. The percentage of establishments present between 11 and 15 years in the same location has risen slightly from 12.6% in 2007 to 14.2% in 2012, declining slightly (-0.2%) in the last year. The proportion of establishments that have been well established in Toronto for sixteen years or more stands at 30.2%, reflecting the long-run stability of the local economy despite recessions, economic slumps and continued expansion of employment growth in areas outside of the City. This proportion has grown by 3.6% or 2,420 establishments during the past five years. Over 14% of establishments have operated at their present location for 25 years or more, showing a great degree of stability in the City.

Figure 5: Change in Number of Establishments, 2002-2012

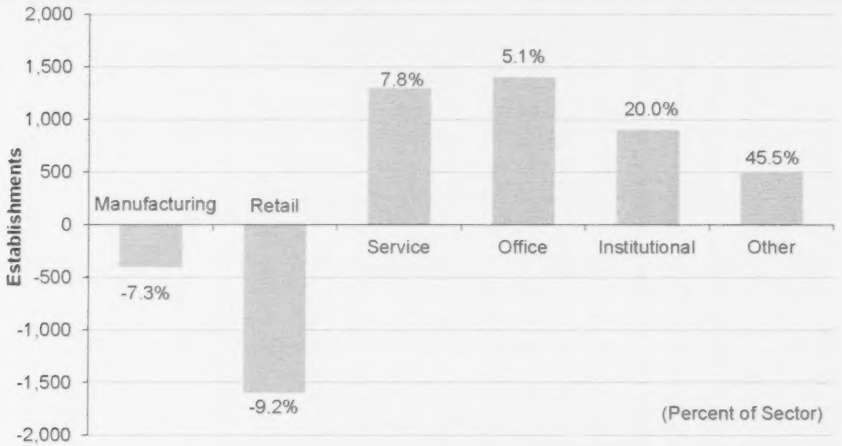


Figure 6: Longevity of Existing Establishments

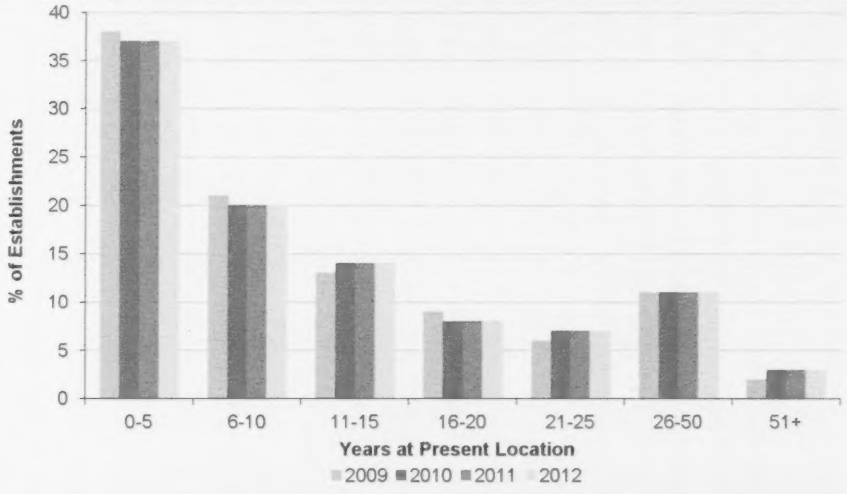


Table 3: New Establishments, 2011-2012

Location	2011	2012
Centres	300	170
Downtown	1,130	760
Employment District	1,260	930
Rest of the City	2,000	1,550
City Total	4,690	3,410

Sector	2011	2012
Manufacturing	240	180
Retail	790	630
Service	1,110	910
Office	1,770	1,380
Institutional	200	180
Other	560	120
City Total	4,670	3,400

** Totals differ due to rounding to the nearest 10.*

New Establishments in the City

The 2012 Employment Survey identified more than 3,400 establishments that were new to the City over the past year. This is about three quarters of the number of new establishments in 2011 (see Table 3). It should be noted that these establishments were not necessarily all new business start-ups, but also include firms relocating from outside the City or new locations of multi-location firms such as banks and coffee shops.

Of the 3,400 newly located establishments, half of these were located in the Downtown and Employment Districts with 760 and 930 respectively, while 170 establishments were in the Centres and 1,600 establishments were found elsewhere in the City (see Figure 7).

The majority, 54% of all new establishments in 2012, were located in the Downtown, Centres or Employment Districts, which is lower than the 57% observed in 2011.

Nearly seven out of every ten new establishments in the City were in the Office or Service sectors (see Figure 8). The Office sector represents four of every ten new establishments, and these continue to be largely in the Business Service and Technical Service subsectors. The former is dominated by law firms and security firms. In the Service sector, new establishments spanned a wide range of businesses, including: restaurants and fast food outlets, beauty salons and barber shops, dry cleaners and laundromats, auto body, muffler and transmission services, and gas stations and car washes. Within the Retail sector, clothing, electronics and shoe retailing stores comprised the majority of the new establishments.

Figure 7: New Establishments by Location, 2012

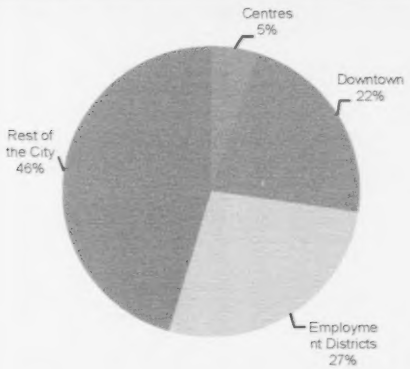
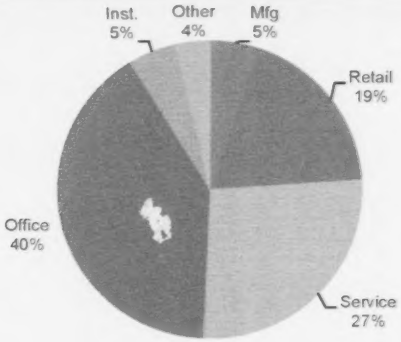


Figure 8: New Establishments by Sector, 2012



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Map 2: Downtown and the Centres, City of Toronto

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New Establishments 2007-2012

In 2012, there were 26,410 establishments that were new to the City in the last five years. This means that 34.8% of all establishments in the City of Toronto have been in the City just five years or less. The majority of these establishments (82.2%) are located in the Official Plan growth management areas: the Downtown, Centres, Employment Districts and Avenues. The Employment Districts saw the largest share of these establishments with 28.1% of all new establishments locating there. The Avenues followed closely with 25.6% establishments. The smallest percentage of new establishments located in Centres with just 5.3%.

Table 4: Total Employment in the Centres and Downtown, 2007-2012

	2007	2008	2009	2010	2011	2012	2007-2012 Net Change	2007-2012 % Change	2011-2012 Net Change	2011-2012 % Change
a. Downtown	415,200	424,900	420,500	432,800	441,900	446,800	31,600	7.6%	4,900	1.1%
b. North York Centre	34,000	34,600	34,700	38,800	36,500	36,100	2,100	6.2%	-400	-1.1%
c. Yonge-Eglinton	15,500	15,400	15,500	15,800	16,800	17,700	2,200	14.2%	900	5.4%
d. Scarborough Centre	13,000	13,800	14,200	14,700	15,000	15,400	2,400	18.5%	400	2.7%
e. Etobicoke Centre	11,100	10,400	9,900	9,200	8,800	8,700	-2,400	-21.6%	-100	-1.1%
Downtown and the Centres	488,800	499,100	494,800	511,300	519,000	524,700	35,900	7.3%	5,700	1.1%
Rest of City	812,800	811,700	816,000	781,900	779,300	792,600	-20,200	-2.5%	13,300	1.7%
City Total	**1,301,600**	**1,310,800**	**1,293,200**	**1,298,300**	**1,317,300**	**1,331,600**	**30,000**	**2.3%**	**14,300**	**1.1%**

Figure 9: Employment Change in Downtown and Centres 2007 - 2012

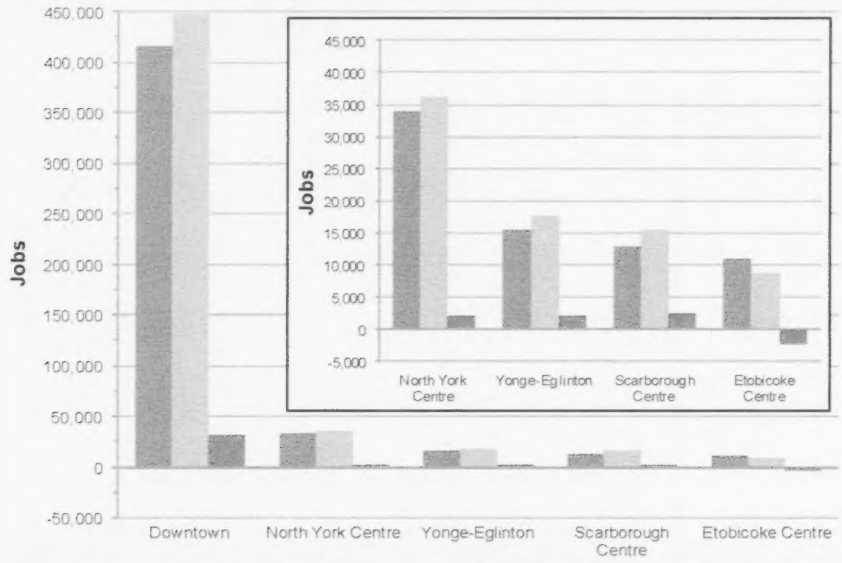


Figure 10: Net Change in Centres Employment 2007 - 2012

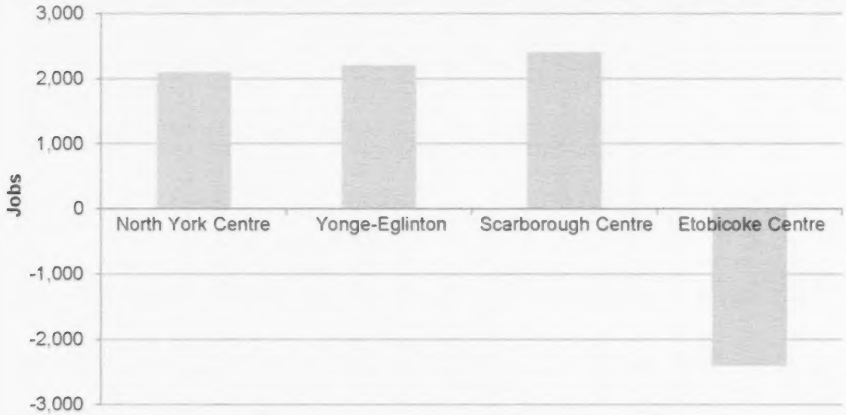
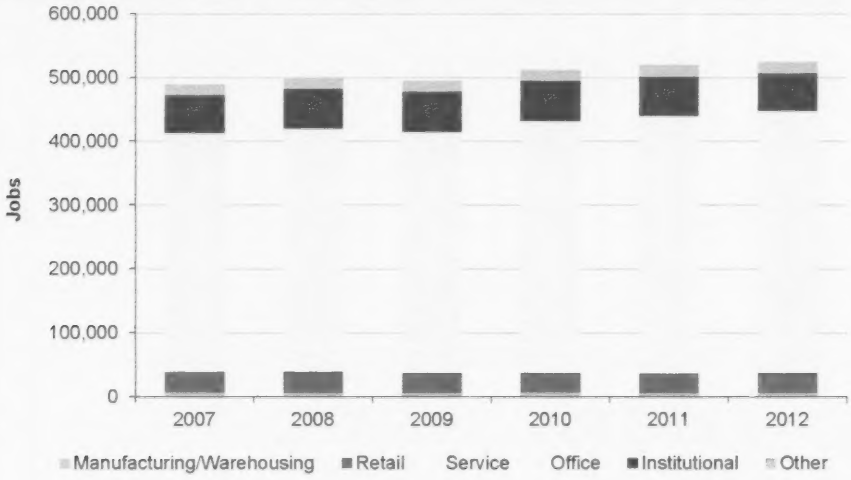


Figure 11: Total Employment in the Downtown and Centres by Six Sectors, 2007-2012



4. Downtown and the Centres

The strength of the regional economy is evident by the concentration of jobs in Downtown and the four Centres designated in the Official Plan. Downtown Toronto is the largest employment area in the Greater Golden Horseshoe. The Downtown and Centres are critical to the City's growth management strategy as attractive mixed use settings for a diverse range of employment and residential growth, making them, and Toronto, a popular place to live, work, and do business. Map 2 shows the locations and boundaries of the Downtown and the Centres, as outlined in the City's Official Plan.

In 2012, there were approximately 524,700 jobs in Toronto's Downtown and Centres, accounting for 39.4% of all jobs in the City (see Table 4). The number of total jobs is up by 35,900 in the last five years, and 9 out of 10 new jobs were in the Downtown. In this five-year period, all the Centres grew except Etobicoke Centre which has experienced a gradual decline in jobs (see Figures 9 and 10). This is due to a few well established firms going out of business or relocating elsewhere in the City over the past few years. Scarborough Centre has seen the most employment growth of the four Centres, adding 2,400 jobs and growing 18.5%. Together, the Downtown and Centres increased by 5,700 jobs or 1.1% over in the last year (see Figure 11). These vital areas continue to be strong incubators and destinations for new jobs, despite an uncertain period in the global, national and local job markets.

A. Downtown

Downtown is the largest employment cluster in the Greater Golden Horseshoe. Its 446,800 jobs make up one in every three jobs found in the City. Downtown employment has grown strongly, by 31,600 jobs over the past five years or 7.6% and by

4,900 jobs or 1.1% in the last year alone. This is a marked slowing of growth versus the 2011 increase of 2.1%. However, this rate of growth outpaces that of the national employment growth rate and that of the province.[3] It is evident that the Downtown has not only weathered the recession but continues to demonstrate stable employment and intensification.

The employment profile of Downtown Toronto is more varied than that of the Centres. The Downtown is dominated by the Office sector. Office employment is currently 298,000 or 66.8% of the Downtown total. The Office sector has continued to grow, increasing by 28,700 jobs over the past five years. The Finance, Insurance and Real Estate subsector leads office sector employment, representing 35.7% of all Office employment in the Downtown. Business Services closely follows, comprising 25.3% of Office jobs. Together they represent 61.1% of all Office jobs in the Downtown. The Government subsector is a distant third representing 12.8% of Downtown Office jobs.

Institutional employment is also concentrated in the Downtown with 56,000 jobs, primarily in universities, colleges, private and public schools. This sector makes up 12.5% of all jobs in the Downtown. More than a quarter of all Institutional sector jobs in the City are located in the Downtown. Employment in the Service sector has increased by 3,600 jobs, while the Institutional and Manufacturing sectors both declined by 750 and 1,300 jobs respectively since 2007.

B. North York Centre

North York Centre is the largest of the four Centres. Nearly half (46.3%) of Centre employment resides in North York Centre, accounting for 6.9% of employment in the Downtown and Centres. It is one of the most active centres for both employment and residential development in the City and home to 36,100 jobs. Since 2007, North York has grown by 2,100 jobs. In 2012, North York Centre remains stable with a modest loss of 1.1% with 400 jobs lost over the past year. Eight out of every ten of the jobs in North York Centre are Office sector jobs. These Office jobs are in subsectors such as Federal and Provincial government, investigation services (security guards and patrol services), banking services, and insurance companies.

C. Yonge-Eglinton

Employment remained relatively stable in this Centre over the years. In 2011 employment began increasing and over the past two years employment has risen by 1,900 or 12.0%. Employment has increased by 5.4% or 900 jobs in the last year alone. With 17,700 jobs, Yonge-Eglinton accounts for 3.4% of all jobs in the Downtown and the Centres. Office employment in the area has seen significant increases in the last year. Office is the dominant sector representing 78.7% of the Centre's employment or 14,000 jobs, and grew by 1,000 jobs in just one year. The Service sector is the next largest sector with 1,700 jobs or 9.7% of centre employment. It has remained stable over the last year.

D. Scarborough Centre

Scarborough Centre has seen the greatest employment growth since 2007of the four Centres. It has gained 2,400 jobs, growing 18.5%. Scarborough Centre's employment rose to 15,400 jobs in 2012, an increase of 360 jobs over 2011, up 2.0%. The Office sector is the largest sector in the Scarborough Centre accounting for 56.2% of all employment. Over the last five years, the Office sector has grown by 1,600 jobs. The Retail sector is the next largest sector and is made up of 3,800 jobs or 24.6% of Employment in the Centre. Scarborough Centre makes up 2.9% of all of the employment found in the Downtown and the Centres.

E. Etobicoke Centre

In 2012, the total number of jobs in Etobicoke Centre stood at 8,700, a loss of just 100 jobs or 1.1% from 2011. Over the last five years, Etobicoke has lost 2,400 jobs, shrinking 22.0%. This decline in jobs is attributed to downsizing by a number of businesses in the Service, Retail and Institutional sectors. This Centre is dominated by the Office sector with 6,100 jobs or 70.1% of Centre employment. The share of total employment in the Downtown and the Centres located in Etobicoke Centre is 1.6%.

5. Employment Districts

The Employment Districts are comprised almost exclusively of employment-related lands, characterized by manufacturing, warehousing and product assembly activities as well as commercial business parks. These are regionally and globally competitive locations for national and international business and as areas for business formation. They provide a broad range of job opportunities for Toronto residents and the regional labour force.

Map 3 shows the locations and boundaries of the 22 Employment Districts identified in the City's Official Plan. The Employment Districts are structural elements of Toronto's economic future in order to not only ensure a stable environment for investment but also maintain and grow the City's revenue base. The former Don Valley Parkway Employment District was composed of six employment areas along the expressway. In the 2011 Bulletin, the three northern employment areas were broken out in order to analyze their distinct character. In this Bulletin, the southern component, the Don Mills / East York Employment District, has also been broken down into its three constituent employment areas, so that the former Don Valley Parkway District is now fully

[3] Toronto Economic Development & Culture, *Economic Indicators August 2012*.

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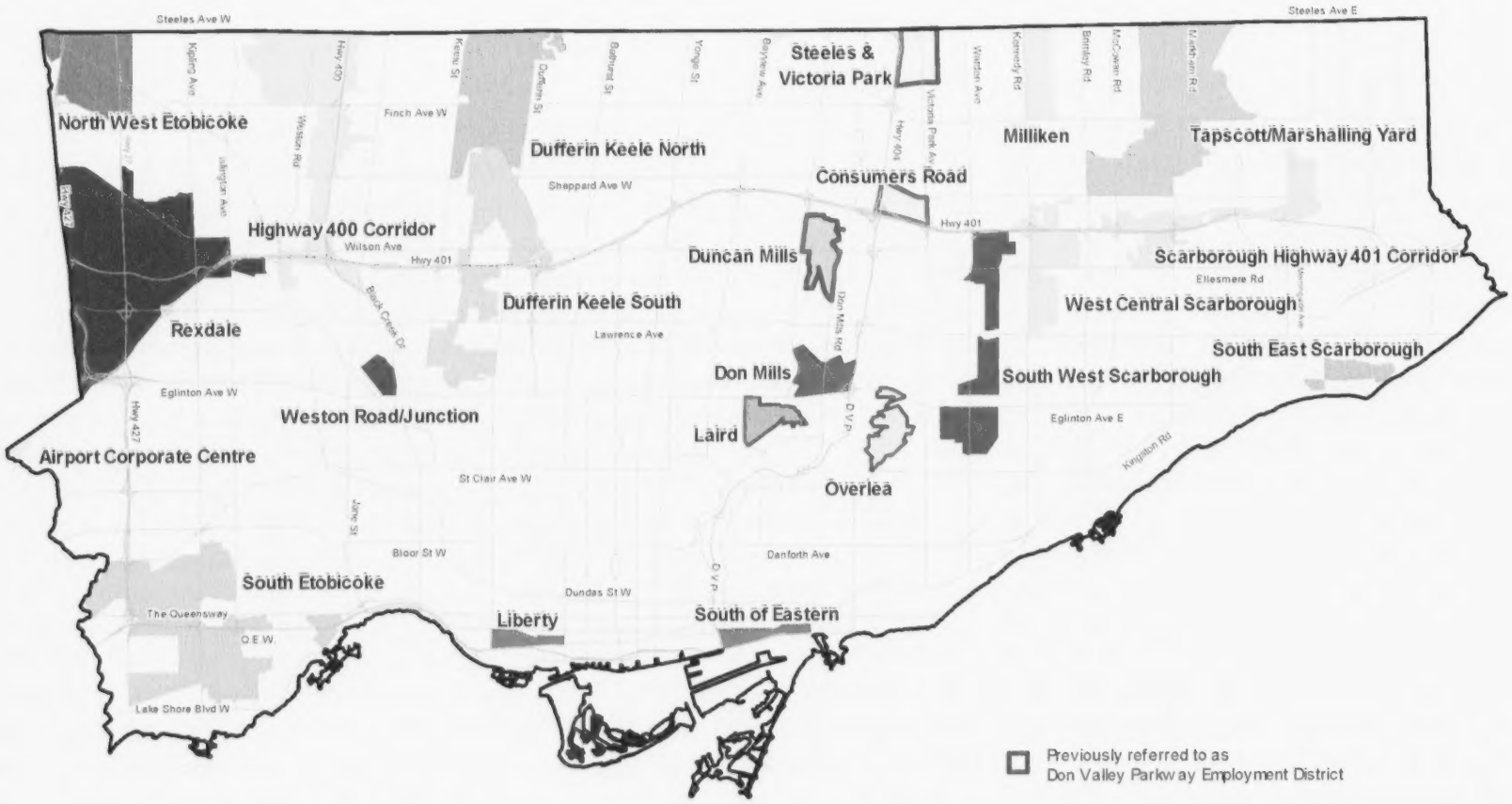
Map 3: Employment Districts, City of Toronto



disaggregated into six Employment Districts to support more detailed comparisons (see Table 5). Just over a quarter of all Office employment resides in the Employment Districts with 148,400 jobs (see Figure 12). The Office sector is the largest sector in the Employment Districts representing 41.3% of all District Employment. The Office sector saw a modest net increase of 700 jobs in 2012 (0.5%). In the last five years, the Office sector has lost 5,600 jobs (3.6%). This is the first year since the economic downturn that the Office sector has grown.

Thirty percent of all Employment District jobs are in the Manufacturing sector, totalling 109,000 jobs. This sector declined by 17,600 jobs over the past five years, but lost just 600 jobs since 2011 and has been comparatively stable over the last 3 years.

The third largest sector is the Service sector, representing 11.3% of District employment, and is followed closely by the Retail sector comprising 10.6% of District employment. The Retail sector has steadily lost employment over the last five years, down 3,000 jobs while the Service sector has continued to grow adding 2,000 jobs or 5.2% over the past five years. In 2012, both the Retail and Service sectors saw growth of 500 and 400 jobs respectively.

The Institutional and Other sectors are the smallest sectors in the Employment Districts with 41,200 and 9,100 jobs respectively. Both of these sectors saw employment growth over 2011 adding a combined 1,200 jobs to the Employment Districts.

The following section presents trends of Employment Districts in descending order of employment base (see Figure 13). A profile of Employment Districts by Sector for 2009 through 2012 is appended (see Table 6).

1. South Etobicoke

South Etobicoke is the largest Employment District in Toronto and is dominated by the Office and Manufacturing sectors. It is home to 40,400 jobs accounting for 11.2% of all Employment District employment in the City. South Etobicoke saw modest employment gains in 2012. However, the District lost employment steadily over the last five years, losing nearly 3,000 jobs, 20.5% of the District's employment. In 2012, the District experienced modest growth, gaining 470 jobs. The Manufacturing sector remains the largest sector in the District representing 39.6% of employment in South Etobicoke. In 2012, this sector continued its downward trend, losing 400 jobs. In the last year, the Office sector saw modest recovery with a 1.5% increase in employment after declining sharply by 14.2% in 2011. The Retail sector gained 640 employees or 14.6% making it the fastest growing sector in South Etobicoke in 2012.

Table 5: Total Employment in the Employment Districts, 2007-2012*

							2007-2012		2011-2012	
	2007	2008	2009	2010	2011	2012	Net Chg	% Chg	Net Chg	% Chg
1. South Etobicoke	43,200	44,000	43,200	41,000	39,800	40,400	-2,800	-6.5%	600	1.5%
2. Rexdale	46,600	47,100	44,700	40,000	38,900	39,500	-7,100	-15.2%	600	1.5%
3. Highway 400 Corridor	35,300	34,200	32,400	31,500	32,800	33,500	-1,800	-5.1%	700	2.1%
4. Dufferin Keele North	31,200	30,800	29,500	31,500	32,400	31,100	-100	-0.3%	-1,300	-4.0%
5. Tapscott/Marshalling Yard	31,600	31,300	30,300	30,400	30,900	31,000	-600	-1.9%	100	0.3%
6. Dufferin Keele South	26,500	26,100	24,300	24,000	24,600	25,100	-1,400	-5.3%	500	2.0%
7. South West Scarborough	19,400	19,200	17,800	18,000	19,000	18,700	-700	-3.6%	-300	-1.6%
8. Duncan Mills	17,400	17,800	17,800	17,900	17,600	18,600	1,200	6.9%	1,000	5.7%
9. Consumers Road	17,000	17,800	19,800	19,000	18,100	17,500	500	2.9%	-600	-3.3%
10. Scarborough Highway 401 Corridor	18,500	18,100	17,400	16,100	16,700	16,800	-1,700	-9.2%	100	0.6%
11. West Central Scarborough	16,500	16,600	15,100	15,500	15,400	14,700	-1,800	-10.9%	-700	-4.5%
12. Steeles & Victoria Park	13,800	14,100	13,300	12,400	12,500	13,300	-500	-3.6%	800	6.4%
13. North West Etobicoke	14,200	13,600	13,200	12,800	12,800	13,000	-1,200	-8.5%	200	1.6%
14. Don Mills**	11,700	11,900	11,400	11,900	11,400	12,000	300	2.6%	600	5.3%
15. Liberty	7,800	7,300	7,700	7,600	8,100	8,300	500	6.4%	200	2.5%
16. Milliken	7,400	7,000	7,100	7,100	7,400	7,300	-100	-1.4%	-100	-1.4%
17. Overlea**	6,700	6,600	6,100	6,300	6,100	6,200	-500	-7.5%	100	1.6%
18. Laird**	5,200	5,200	4,400	4,700	4,500	4,400	-800	-15.4%	-100	-2.2%
19. South of Eastern	6,200	5,500	5,100	4,700	4,000	4,000	-2,200	-35.5%	0	0.0%
20. Weston Road/Mount Dennis	1,100	1,000	1,700	1,700	1,700	1,900	800	72.7%	200	11.8%
21. Airport Corporate Centre	1,000	1,100	1,100	1,000	1,100	1,200	200	20.0%	100	9.1%
22. South East Scarborough	1,100	1,000	1,000	1,000	900	1,000	-100	-9.1%	100	11.1%
All Employment Districts	**379,400**	**377,300**	**364,400**	**356,100**	**356,700**	**359,500**	**-19,900**	**-5.2%**	**2,800**	**0.8%**
Rest of the City	922,200	933,500	928,800	942,200	960,600	972,100	49,900	5.4%	11,500	1.2%
City Total	**1,301,600**	**1,310,800**	**1,293,200**	**1,298,300**	**1,317,300**	**1,331,600**	**30,000**	**2.3%**	**14,300**	**1.1%**

** Numbers have been rounded to the nearest hundred. Districts are in descending order by size of employment base.*

*** Formerly part of the Don Mills/ East York Employment District.*

2. Rexdale

Rexdale is home to 39,500 jobs or 11.0% of employment found in the Employment Districts and is dominated by both Office and Manufacturing sectors. In the last five years, this District has shrunk by 15.3%, losing 7,100 jobs. This loss has been largely due to some major employers in this District shedding employment but staying in the District. As well, a couple of large firms have moved outside of the City while a few mid-sized firms have gone out of business. For the first time since the economic downturn of 2008, employment in Rexdale increased in 2012 by 1.4%, resulting in 530 additional jobs. Similarly, the downward trend in the Office sector was reversed for the first time in five years, growing 1,200 jobs or 8.8% and replacing the Manufacturing sector as the largest sector in the District. The Manufacturing sector continued its downward trend in 2012, declining 5.6% and losing 750 jobs in 2012.

Figure 12: Total Employment in Employment Districts by Six Sectors, 2007-2012

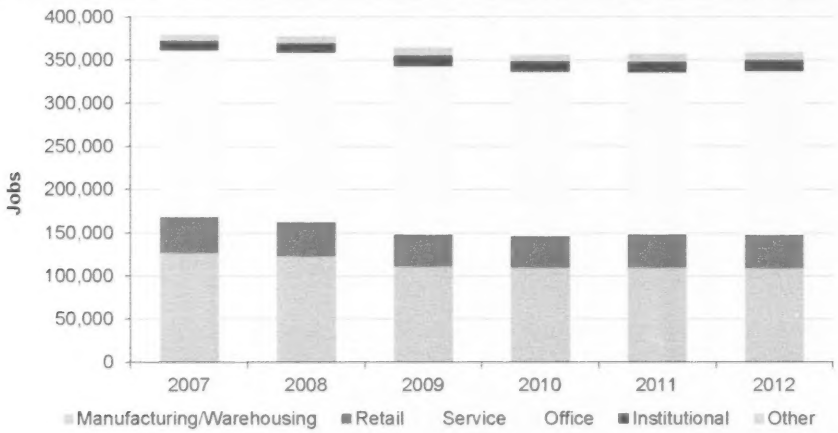
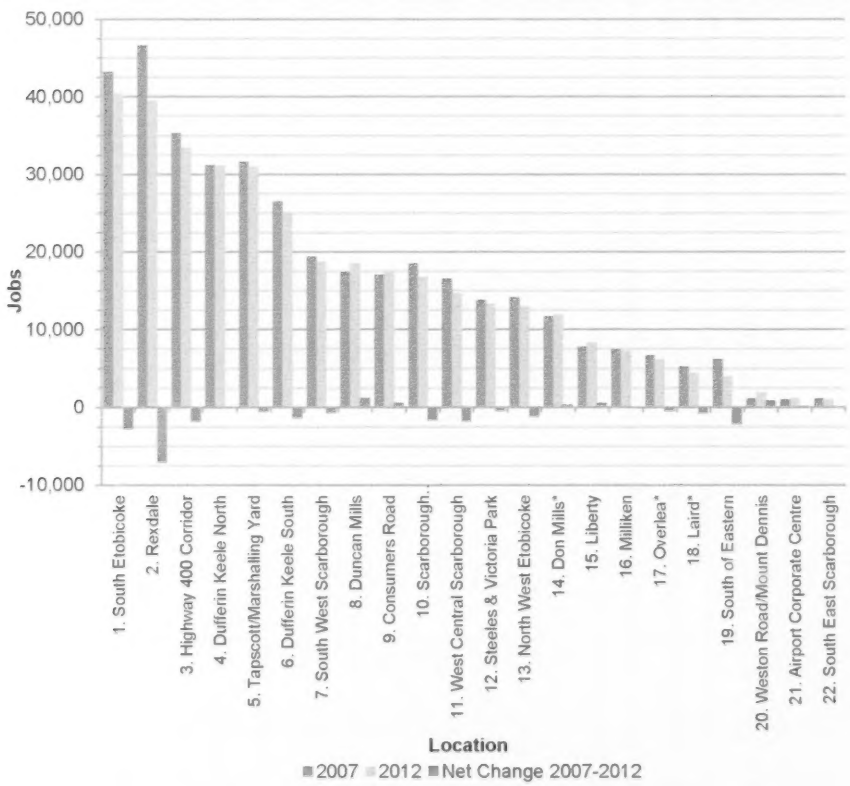


Figure 13: Employment Change in Employment Districts 2007 - 2012



3. Highway 400 Corridor

The Highway 400 corridor contains 33,500 jobs or 9.3% of jobs found in the Employment Districts. The District grew by 730 jobs or 2.2% since 2011. Just over half of all jobs in the District (50.2%) reside in the Manufacturing sector. The Processed Goods subsector makes up more than half of Manufacturing jobs in the District. The Manufacturing sector grew by 1,000 jobs this year (6.5%), the first increase since the economic downturn in 2008. In the last five years, the sector has experienced a net loss of 1,200 jobs. The Office sector has grown by 12.9% or 1,000 jobs over the same period.

4. Dufferin Keele North

This District contains 31,100 jobs or 8.7% of all jobs in the Employment Districts. Employment decreased by 1,400 jobs or 4.2% over the last year. The District has lost only 130 jobs overall since 2007, showing a relatively stable employment count with only small fluctuations over the last five years. The District is led by the Office sector consisting of 12,800 jobs or 41.1% of District employment, followed by the Manufacturing sector with 8,600 jobs or 27.7% of District employment. Office employment has grown for the last five years, up 8.4% or by 900 jobs. The largest subsector within the Office sector is the cluster composed offices associated with Mining, Manufacturing, Transportation, Utilities, Construction and Resource Production activities with 3,300 jobs. In the last five years, the Retail sector has experienced the greatest rate of decline, losing 15.6% of employment. The Manufacturing sector has experienced the greatest net loss of employment totalling 900 jobs or 9.5%.

5. Tapscott/Marshalling Yard

Tapscott Marshalling Yard is home to 8.6% of the total employment found in Employment Districts, accounting for 31,000 jobs. This District has remained quite stable over the last five years and was unchanged over the past year. The Manufacturing sector comprises 4 of every 10 jobs in this District. The Processed Goods subsector (5,300 jobs) and the Product Assembly subsector (4,000 jobs) together represent almost three quarters (73.7%) of all Manufacturing jobs in the District. Over the past five years, there has been a gradual decline in Manufacturing employment, down 2,600 jobs or 17.0%. The Service sector has seen major gains in the last five years, increasing by half (50.7%) or 1,400 jobs. The majority of these gains were made in 2011 when the District grew 40.3% or 1,200 jobs. This is due to one firm in particular, in which in the past year has consolidated its satellite workforce to its central location in this District. The Office sector is the second-largest sector in the District and declined by 250 jobs in 2012. This is the second year in a row the sector has shrunk after years of steady growth.

6. Dufferin Keele South

This District contains 25,100 jobs and 7.0% of all Employment District jobs. Employment has continued its trend of growth in 2012 gaining 500 jobs and growing by 2.0%. Four of the six sectors in the District saw modest increases in employment, while the Institutional sector was stable, losing just 0.1%and the Retail sector lost a modest 70 jobs, shrinking by 1.5%. The Office sector continues to be the largest sector in the District, accounting for 10,200 jobs. Four out of every ten jobs in the District reside in the Office sector (40.6%); the sector grew by 340 jobs in 2012. The Manufacturing and Retail sectors are next in size with 5,200 and 4,900 jobs respectively.

7. South West Scarborough

South West Scarborough contains 5.2% of the employment found in Employment Districts, containing 18,700 jobs. The District's employment has fluctuated over the last five years with a net loss of 11.7% or 2,000 jobs. The Office sector is the largest sector in the District, followed closely by the Manufacturing sector, with 6,100 and 5,800 jobs respectively. All sectors have experienced losses over 2012 except the Service sector which grew by 4.1% or just 85 jobs. The Manufacturing sector saw the greatest net loss in employment by far, losing 1,200 jobs and shrinking 17.1%.

8. Duncan Mills

The Duncan Mills Employment District accounts for 5.2% of the employment found in the Employment Districts, containing 18,600 jobs. Over the last five years, the District added 1,200 jobs, gaining just over 1,000 jobs (5.5%) in the past year. This year, every sector saw gains in employment. The Institutional sector saw the largest year-over-year net gain, 600 jobs or 47.8%, and the largest net gain over the past five years, 650 jobs or 51.2%. The Manufacturing sector shrank by 500 jobs (32.0%), although, in 2012 by only 0.8% or just 10 jobs. The Office sector is the dominant sector in the District comprising 70.4% of all employment. Within this sector, the Communications and Media subsector represents 32.9% of the employment.

9. Consumers Road

There are 17,500 jobs in the Consumers Road Employment District, representing 4.9% of all Employment District jobs. Over the last five years, this Employment District has seen a 2.8% increase in employment, a net growth of 480 jobs. However, since 2009 the sector has lost 2,300 jobs, an 11.6% decrease. In 2012, 660 jobs were lost. Employment in the District is dominated by the Office sector with 9 out of every 10 jobs (93.1%). This sector is dominated by the Business Services and the Finance, Insurance and Real Estate subsectors, together comprising more than half of all Office employment.

10. Scarborough Highway 401 Corridor

This District contains 4.7% of the employment found in the Employment Districts, a total of 16,800 jobs, up a modest 150 jobs this year. The District has seen a net loss of 1,800 jobs over the last five years (-9.7%). While the Office sector remains the largest sector, it is not as prominent as it once was. It now represents 43.5% of the District's employment, down from 52.1% just five years ago and a loss of 4,400 jobs or -24.7%. Meanwhile, the Manufacturing sector remains the second-largest sector and has seen healthy gains in the last two years, adding 1,400 jobs and growing by 41.4%. The Retail and Service sectors are the next largest sectors with 1,900 and 1,800 jobs respectively. In the last five years, the Retail sector has shrunk by 220 jobs or 10.5% while the Service sector has grown by a modest 65 jobs or 3.7%.

11. West Central Scarborough

There are currently 14,700 jobs in West Central Scarborough, which amounts to 4.1% of employment within the Employment Districts. Since 2007, employment has declined by 1,700 jobs or 10.5% with 640 jobs lost in 2012 alone. The Manufacturing sector is the largest sector in the District with 6,600 jobs or 44.9% of employment. Over the last five years, Manufacturing employment fell by 2,000 (or 22.9%). In 2012, the Manufacturing sector remained stable while the Office and Service sectors lost 600 jobs and 400 jobs respectively. The Institutional and Other sectors were the only sectors to gain employment, adding 367 and 30 jobs respectively.

12. Steeles/Victoria Park

Steeles/Victoria Park contains 13,300 jobs or 3.7% of all employment found in Employment Districts. This District lost employment over the last five years, down 500 jobs or 3.6% of its 2007 total. In 2012, this District grew by 770 jobs or 6.1%. The Office sector represents 75.9% of all employment activity in the District. Finance, Insurance and Real Estate comprises 48.2% of all Office employment. In 2012, all sectors in the District saw growth with the exception of the Other sector which lost just 45 jobs.

13. North West Etobicoke

This Employment District is home to 13,000 jobs or 3.6% of all Employment District employment. Over the last five years, the District has lost 1,200 jobs (8.6%), but in 2012, the District saw modest growth, gaining 200 jobs or 1.5%. This is the first year since the 2008 downturn that the District has seen significant employment gains. Half of all jobs are in the Manufacturing sector which has 6,500 jobs. In the last five years 2,300 jobs (26.3%) jobs have been lost in that sector. However, in 2012, the sector saw its first gains since the economic downturn, growing by 1.9% and gaining 120 jobs. Overall, the District made gains in 2012 with the exception of the Service sector which shrunk by just 40 jobs. The Office sector is a significant employer in the District with 4,100 jobs, and growth of 1,100 jobs (37.6%) in the last five years.

14. Don Mills

Don Mills contains 12,000 jobs representing 3.3% of all Employment District jobs. Over the past five years, employment has fluctuated, with a net loss of 2.3% or 270 jobs. However, in the last year, Don Mills has seen growth in employment with 600 jobs gained. The Office sector is by far the largest sector in the District with 73.3% of all jobs. It is the only sector that has seen consistent growth over the last 3 years, having grown by 750 jobs or 9.3% since 2010. The Office sector is dominated by the Mining, Manufacturing, Transportation; Utilities, Resource Product & Construction Office subsector and the Business Services subsector representing 30.5% and 29.4% of all Office sector jobs respectively. Manufacturing is the second-largest sector representing 17.5% of employment or 2,100 jobs. In 2012, the sector grew by 120 jobs or 6.2%.

15. Liberty

The Liberty Employment District is home to 8,300 jobs, representing 2.3% of all Employment District jobs. From 2007 to 2012, employment in this District increased by 530 jobs or 6.9%. In 2012, the District added 160 jobs or 2.0%. Liberty's dominant employment sector is Office with 5,800 jobs or seven in ten jobs in the District. The Office sector grew by 3.7% or 200 jobs last year. The Business Services subsector represents 3,300 jobs or 63.2% of all Office employment in the District. This subsector increased by 400 jobs in the past year.

16. Milliken

The Milliken Employment District contains 7,300 jobs or 2.0% of all Employment District jobs. The majority of employment belongs to the Office sector, with 3,100 jobs or 42.5% of all jobs in the District. This sector gained 260 jobs between 2011 and 2012, increasing by 9.2%. Between 2007 and 2012, total employment grew by 2.1% or 150 jobs. In 2012, Milliken grew by 5.1% or 360 jobs with every sector showing growth except the Manufacturing sector which lost 1.3% of its employment, continuing its downward trend. The Manufacturing sector has lost 41.7% of its total employment over the last five years.

17. Overlea

The Overlea Employment District represents 1.7% of all employment in the Employment Districts and 6,200 jobs. In 2012, this District grew by 2.1% or 130 jobs. The Manufacturing sector is the largest sector with 2,500 jobs or 40.1% of all jobs in the District. Over each of the last five years, this sector has lost employment, shrinking 21.9% over the period. In 2012, 210 jobs were lost from the Manufacturing sector. The Office sector is the second-largest in the District with 1,900 jobs and gained 220 jobs over 2012 for a 13.1% increase.

18. Laird

The Laird Employment District is home to 4,400 jobs or 1.2% of all employment in the Employment Districts. Over the last five years, this District has lost 850 jobs, shrinking by 16.2%. In 2012, the District lost 160 jobs or 3.5%. The Office sector represents one in every three jobs in the District (34.1%) or 1,500 jobs. In the last year, this sector has grown by 3.4% or 50 jobs, but over the last five years this sector has lost 19.1% or 360 jobs. The second largest sector is Manufacturing which represents employment of 1,400. This sector has lost 440 jobs over the last five years for a loss of 24.6%.

19. South of Eastern

There are 4,000 jobs in the South of Eastern Employment District, which amounts to 1.1% of the total employment within all Employment Districts. Over the last five years, this District has lost 2,300 jobs, a 36.2% decline. The District stabilized over 2012 with no loss or gain of employment. The Manufacturing and Office sectors both continue to dominate with 1,900 jobs (47.5%) and 1,300 jobs respectively (32.5%). The Manufacturing sector remained unchanged over 2012 while the Office sector grew by 8.2%. The Manufacturing sector is almost exclusively represented by the Printing, Reproduction, Data Processing and Sorting subsector

with 1,800 jobs, about 97.3% of total Manufacturing employment. The Office sector is led by the Government subsector with 700 jobs, more than half of all Office jobs in the District. The greatest net loss of employment occurred in the Service sector which shrunk by 44.5% over the last 5 years; the majority of this loss occurred in 2012.

20. Weston Road/Mount Dennis

Over five years, employment in this smaller District increased by 800 jobs or 74.8% to 1,900 jobs but it represents just 0.5% of total Employment District jobs. Since the economic downturn of 2008, this District has seen healthy and consistent growth in all sectors with the exception of the Office sector which has seen a loss of 130 jobs. In 2012, the total number of jobs grew by 12.1% or 200 jobs. The largest employment sector is the Service sector with 800 jobs, representing 42.1% of employment activity in the District. The Manufacturing sector is now the second-largest sector in the District with 400 employees, growing some 33.1% over the last year. Although, over the last five years, Manufacturing saw a 13.6% loss of employment.

21. Airport Corporate Centre

The Airport Corporate Centre is part of a much larger "Airport node" associated with Pearson International Airport, most of which is in the City of Mississauga. The District contains 1,200 jobs or 0.3% of all employment found in Toronto Employment Districts. Employment increased by 200 jobs or 21.3% between 2007 and 2012. Its largest employment sector is the Manufacturing sector. This sector contains 450 jobs, followed closely by the Office sector with 400 jobs. These two sectors make up 70.8% of total employment in the District. Both the Manufacturing and Office sectors saw growth in 2012 of 2.7% and 7.9% respectively. The Office sector's growth is primarily in the Business Services subsector representing 23.2% of employment in the District. Total employment in the District has grown by 100 jobs in 2012, up 7.9%.

22. South East Scarborough

The South East Scarborough Employment District is Toronto's smallest employment District with just 1,000 employees or 0.3% of all employment found in Employment Districts. South East Scarborough experienced a decline of 120 jobs or 11.0% between 2007 and 2012. The Manufacturing sector is the largest in the District with 600 jobs. The majority of its jobs are found in the Processed Goods subsector with 300 employees representing 51.6% of Manufacturing employment.

Table 6: Total Employment in Employment Districts by Sector, 2009-2012

Employment District	Sector	Manufacturing				Retail				Service			
	Year	2009	2010	2011	2012	2009	2010	2011	2012	2009	2010	2011	2012
South Etobicoke		16,510	16,000	16,420	15,980	4,560	4,340	4,390	5,040	5,450	5,420	5,260	5,450
Rexdale		12,880	13,430	13,310	12,560	2,860	2,540	2,540	2,710	7,140	7,090	6,690	6,750
Highway 400 Corridor		15,710	15,180	15,810	16,840	3,140	3,060	3,180	2,920	4,460	4,670	4,540	4,510
Dufferin Keele North		7,960	8,630	9,050	8,600	4,720	4,720	4,710	4,670	2,670	2,790	2,870	2,870
Tapscott/Marshalling Yard		13,200	12,890	12,530	12,710	4,140	4,080	4,270	4,100	2,950	2,910	4,090	4,170
Dufferin Keele South		5,460	4,920	5,100	5,250	4,570	4,550	4,950	4,880	2,800	2,820	2,830	2,860
South West Scarborough		5,540	5,650	5,970	5,770	2,300	2,210	2,310	2,270	2,090	2,110	2,070	2,160
Duncan Mills		950	940	1,060	1,070	800	700	800	800	1,300	1,300	1,300	1,500
Consumers Road		120	110	100	40	140	110	130	130	350	380	400	350
Scarborough Highway 401 Corridor		3,350	3,260	4,580	4,610	1,810	1,760	1,740	1,900	2,320	1,560	1,820	1,840
West Central Scarborough		6,810	6,880	6,630	6,640	1,980	2,000	1,970	1,900	2,080	2,180	2,320	1,920
Steeles & Victoria Park		1,640	1,520	1,160	1,270	480	420	620	710	360	360	360	380
North West Etobicoke		7,590	7,420	6,410	6,530	900	890	870	920	1,270	1,340	1,120	1,180
Don Mills		2,580	2,590	1,950	2,070	780	830	750	780	160	160	140	150
Liberty		1,070	1,070	1,050	950	340	360	430	460	780	1,050	900	900
Milliken		1,150	1,010	930	920	1,160	1,220	1,260	1,210	1,240	1,280	1,350	1,360
Overlea		2,580	2,650	2,700	2,490	850	900	900	900	570	590	400	520
Laird		1,670	1,470	1,570	1,360	1,020	1,160	1,110	1,140	240	270	310	280
South of Eastern		2,410	2,120	1,860	1,860	530	530	550	550	330	390	330	210
Weston Road/Mount Dennis		300	400	310	410	70	70	60	80	780	790	800	820
Airport Corporate Centre		470	470	440	450	10	0	0	30	180	190	230	240
South East Scarborough		670	700	610	600	20	20	20	30	20	30	40	90
All Employment Districts		**110,620**	**109,310**	**109,550**	**108,980**	**37,180**	**36,470**	**37,560**	**38,130**	**39,540**	**39,680**	**40,170**	**40,510**
Rest of the City		19,480	20,190	19,050	19,220	105,120	104,030	104,040	105,170	111,460	111,220	115,330	117,790
City Total		130,100	129,500	128,600	128,200	142,300	140,500	141,600	143,300	151,000	150,900	155,500	158,300

Employment District	Sector	Office				Institutional				Other				Total			
	Year	2009	2010	2011	2012	2009	2010	2011	2012	2009	2010	2011	2012	2009	2010	2011	2012
South Etobicoke		15,080	13,310	11,420	11,590	630	820	740	720	960	1,060	1,680	1,610	43,190	40,950	39,910	40,390
Rexdale		16,470	13,500	13,090	14,240	1,140	1,300	1,190	1,120	4,210	2,140	2,160	2,110	44,700	40,000	38,980	39,490
Highway 400 Corridor		8,210	7,710	8,610	8,550	560	480	440	480	300	360	240	240	32,380	31,460	32,820	33,540
Dufferin Keele North		12,140	13,330	13,680	12,770	1,380	1,420	1,600	1,610	630	650	530	560	29,500	31,540	32,440	31,080
Tapscott/Marshalling Yard		8,810	9,340	7,760	7,510	780	730	660	730	430	460	1,650	1,740	30,310	30,410	30,960	30,960
Dufferin Keele South		9,580	9,960	9,850	10,190	1,520	1,540	1,670	1,670	390	200	210	260	24,320	23,990	24,610	25,110
South West Scarborough		5,640	5,650	6,190	6,090	1,160	1,260	1,270	1,220	1,110	1,130	1,180	1,160	17,840	18,010	18,990	18,670
Duncan Mills		13,600	13,400	13,100	13,100	1,100	1,500	1,300	1,900	0	0	100	100	17,750	17,840	17,660	18,470
Consumers Road		18,520	17,880	16,900	16,320	520	440	450	480	130	140	160	170	19,780	19,060	18,140	17,490
Scarborough Highway 401 Corridor		8,710	8,330	7,420	7,290	1,170	1,060	970	1,000	100	120	140	170	17,460	16,090	16,670	16,810
West Central Scarborough		3,630	3,810	3,840	3,250	450	480	460	830	120	140	160	180	15,070	15,490	15,380	14,720
Steeles & Victoria Park		9,970	9,300	9,510	10,090	660	660	690	710	150	160	160	120	13,260	12,420	12,500	13,280
North West Etobicoke		2,980	2,890	4,100	4,110	240	130	160	110	190	160	150	150	13,170	12,830	12,810	13,000
Don Mills		7,580	8,070	8,350	8,820	150	130	100	90	120	130	90	80	11,370	11,910	11,380	11,990
Liberty		5,370	4,940	5,580	5,790	60	30	50	70	90	110	120	130	7,710	7,560	8,130	8,300
Milliken		2,890	2,900	3,170	3,070	620	580	630	660	80	80	90	80	7,140	7,070	7,430	7,300
Overlea		1,770	1,840	1,710	1,930	280	290	300	300	10	10	60	80	6,060	6,280	6,070	6,220
Laird		1,280	1,700	1,480	1,530	50	40	40	20	110	50	40	50	4,370	4,690	4,550	4,380
South of Eastern		1,740	1,500	1,200	1,300	50	90	30	50	20	20	30	10	5,080	4,650	4,000	3,980
Weston Road/Mount Dennis		270	160	150	180	310	300	330	360	0	0	0	0	1,730	1,720	1,650	1,850
Airport Corporate Centre		320	320	410	440	30	30	30	30	50	30	40	40	1,060	1,040	1,150	1,230
South East Scarborough		210	200	200	220	20	20	30	20	20	10	30	30	960	980	930	990
All Employment Districts		**154,770**	**150,040**	**147,720**	**148,380**	**12,880**	**13,330**	**13,140**	**14,180**	**9,220**	**7,160**	**9,020**	**9,070**	**364,210**	**355,990**	**357,160**	**359,250**
Rest of the City		456,130	473,260	480,180	489,720	203,620	200,170	206,660	204,220	33,280	33,340	34,880	36,130	928,990	942,310	960,140	972,350
City Total		610,900	623,300	627,900	638,100	216,500	213,500	219,800	218,400	42,500	40,500	43,900	45,200	1,293,200	1,298,300	1,317,300	1,331,600

6. NAICS Coding

In 2011, City Planning undertook to incorporate the North American Industry Classification System (NAICS) into the data collection process of the Toronto Employment Survey. NAICS was established by Statistics Canada and the statistics agencies of Mexico and the United States to provide a coding standard that allows for data analysis and comparison across municipal, provincial, and national boundaries. NAICS coding is extremely detailed and highly specific. Determining the precise industrial classification of individual business establishments requires rigourous training, standards and discipline.

This second year of assigning complete NAICS codes to each business establishment in the City of Toronto was largely successful with 98.9% of businesses assigned a full 6-digit code, up by 3.2%. More general classifications were assigned in some of the remaining 1.1% of cases. Coding the data to the lowest, most detailed coding enables it to be aggregated to higher levels during analysis and when making comparisons.

LUACs and NAICS

NAICS coding is in addition to the ongoing coding of occupant activity and land uses that is a key element of the Toronto Employment Survey. The Land Use Activity Code (LUAC) standard was developed by the Regional Information Systems Working Group of the Regional Planning Commissioners of Ontario and has been used consistently by the City of Toronto and updated carefully over the past 30 years. City Planning staff have adapted it over time, interpreting the codes to accommodate the evolution of the local land economy and to recognize entirely new lines of economic activity that were not identified three decades ago, while maintaining overall stability of the coding so as to enable longitudinal analysis.

LUACs and NAICS represent fundamentally different classifications of economic activity. NAICS is designed to capture supply-side "production processes" such that processes based on similar technologies are grouped together. According to Statistics Canada, it is a "supply-based, or production-oriented, economic concept [to be used for] measuring productivity, unit labour costs, and capital intensity of production, estimating employment-output relationships, constructing input-output tables, and other uses that imply the analysis of production relationships in the economy"[4]. By comparison, the Land Use Activity Codes were designed to describe the overall economic activity and to emphasize the relationship between that activity and its use of land. Thus, while the highly-detailed NAICS coding may distinguish a series of "production processes", their relationship to land use might properly be described by a more general LUAC class, and it is this latter grouping of activity that is the primary function of the LUAC coding.

The Toronto Employment Survey and NAICS identify business establishments differently, which can contribute to substantially different classifications. The Employment Survey identifies an establishment as a place of work with a distinct economic activity at a single location. NAICS identifies an establishment as "a statistical unit…defined as the most homogeneous unit of production for which the business maintains accounting records from which it is possible to assemble all the data elements required to compile the full structure of the gross value of production…. [H]owever, producing units may be grouped. An establishment comprises at least one location but it can also be composed of many"[5]. In both coding systems, more than one establishment may be identified at the same location where activities can be distinguished, such as shops in a hotel. Nevertheless, the basic unit of observation may differ between the two coding systems, potentially leading to very different classifications of the activities at the same physical location.

Previous attempts to aggregate NAICS codes into LUACs were unsuccessful due to the fundamentally different coding principles. The counterpart of a given Land Use Activity Code for a particular occupant or parcel may involve many NAICS codes. It is also true that within the broad diversity of land use in the City, the production process represented by a given NAICS code *on the ground* may bear a relation to different LUACs in different physical settings. A given NAICS code captures the economic activity but not necessarily its physical relationship to land and built space, which is one of the strengths of LUAC standard. By classifying an establishment by both coding standards, the City can produce two distinct yet complementary views of the economic activity within its borders.

Comparative Results

The 2012 Toronto Employment Survey resulted in the application of 309 distinct Land Use Activity Codes out of a possible 449 1- 2- and 3-digit codes. NAICS 2007 contains 2,093 2- to 6-digit codes, and 1,067 distinct instances occur in the 2012 Toronto Employment Survey. There was a significant decrease in the number of

[4] Statistics Canada (2012) *North American Industrial Classification System (NAICS) Canada 2012*, at http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2012/preface-eng.htm, last visited January 10, 2013.
[5] Statistics Canada (2012) *North American Industrial Classification System (NAICS) Canada 2007*, at http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2007/introduction-eng.htm, last visited January 18, 2013.

individual NAICS codes used, largely due to more precise and consistent coding, including the replacement of interim 2- and 3-digit codes with 5- and 6-digit codes. Nevertheless, 68.8% of all possible LUACs and 51.1% of all possible NAICS 2007 employment activities are present in the City of Toronto, depicting a robust and diverse employment base.

A comparison of the ten most frequently-occurring LUACs and NAICS codes in the 2012 Survey results demonstrates a great deal of consistency in the citywide results of the two coding standards. Both contain business activities such as restaurants, fast food outlets, law and doctors offices and cosmetic services in their most commonly used codes (see Figures 14 and 15). This indicates that the overall quality of data collection and classification by NAICS code is comparable to that of LUACs. However, given the differing levels of detail between the two coding systems, the number of establishments classified by each code is noticeably different.

NAICS coding has been able to provide greater detail about the composition of retail activity in the city. "Other Speciality Stores" has long been one of the most frequently occurring LUACs in Toronto. There are about 3,300 instances in the 2012 results. Due to its broad definition and the changing nature of retail uses over the past 30 years, this code has increasingly been assigned to retail activities that defy strict classification under the current LUAC coding convention. NAICS has been able to provide a more fulsome and precise description of this type of employment activity, depicting a wide variety of product retailers. The survey findings suggest that there is a high level of consistency between the NAICS and LUAC coding for these types of establishments, while at the same time the NAICS codes provide a more detailed and complex portrait of employment activity in the City.

Figure 14: Top 10 LUACS

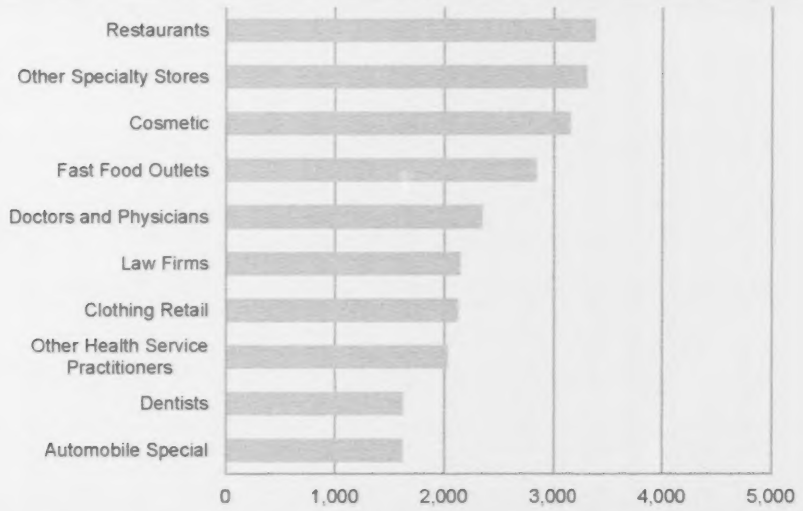
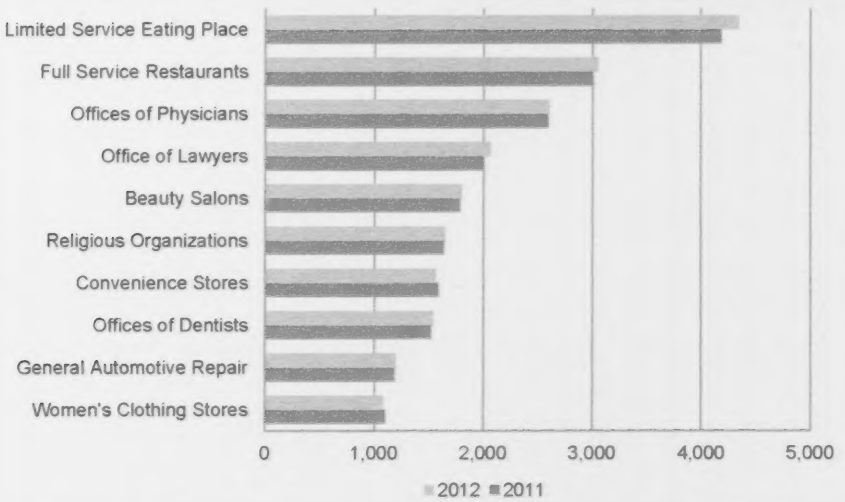


Figure 15: Top 10 NAICS



NAICS 2011-2012

Over 2012, the five largest sectors remained the same (see Figure 16). The Health and Social Assistance sector remained the largest NAICS sector with 154,600 employees, comprising 11.6% of employment. This sector is followed closely by the Professional, Scientific and Technical Services with 141,900 jobs representing 10.7%. Retail Trade is the third largest sector representing 10.1% of all employment.

All other sectors saw a moderate to large increase in employment (see Figure 17) with the exception of the primary industry and utility sectors. The Construction sector experienced the greatest increase in employment by far, gaining 7,200 employees and growing by 26.9%. It should be noted that a portion of all sectoral increases can be attributed to the normalization of NAICS coding procedures and methods in this second year of NAICS coding. Some 2,132 previously un-coded establishments were assigned NAICS codes, placing an additional 37,370 jobs into the twenty 2-digit NAICS sectors. In 2012, just 27 establishments remain un-coded.

Our objective in the application of NAICS is to develop a consistency in interpretation and application that will enable longitudinal analysis, as has been achieved with LUACs. The Toronto Employment Survey employs Industrial Classification Coding System (ICCS) tools provided by Statistics Canada so that the results will be comparable to other datasets and much superior to using LUACs for this purpose. The addition of NAICS has greatly increased the comparability of our employment data with that of the new and ongoing employment survey programmes of other Ontario municipalities, while still maintaining a 30-year dataset and enhancing a municipal field survey programme now entering its fourth decade.

Figure 16: Employment by NAICS Sector

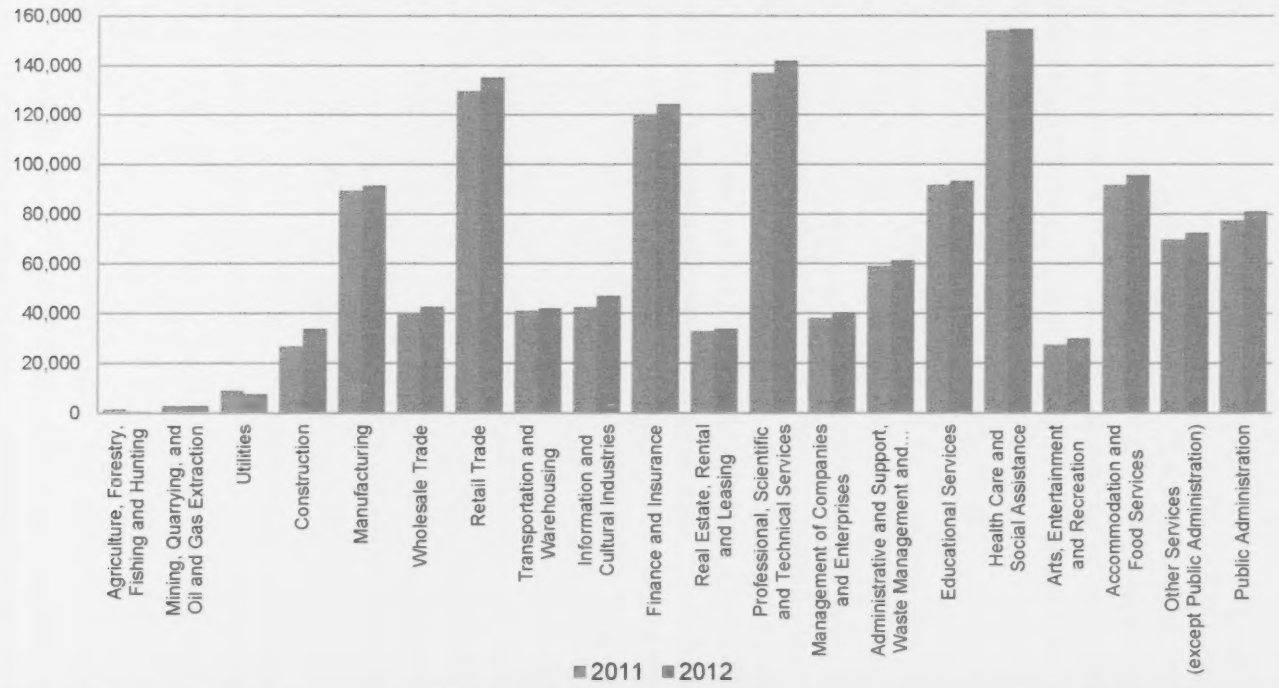
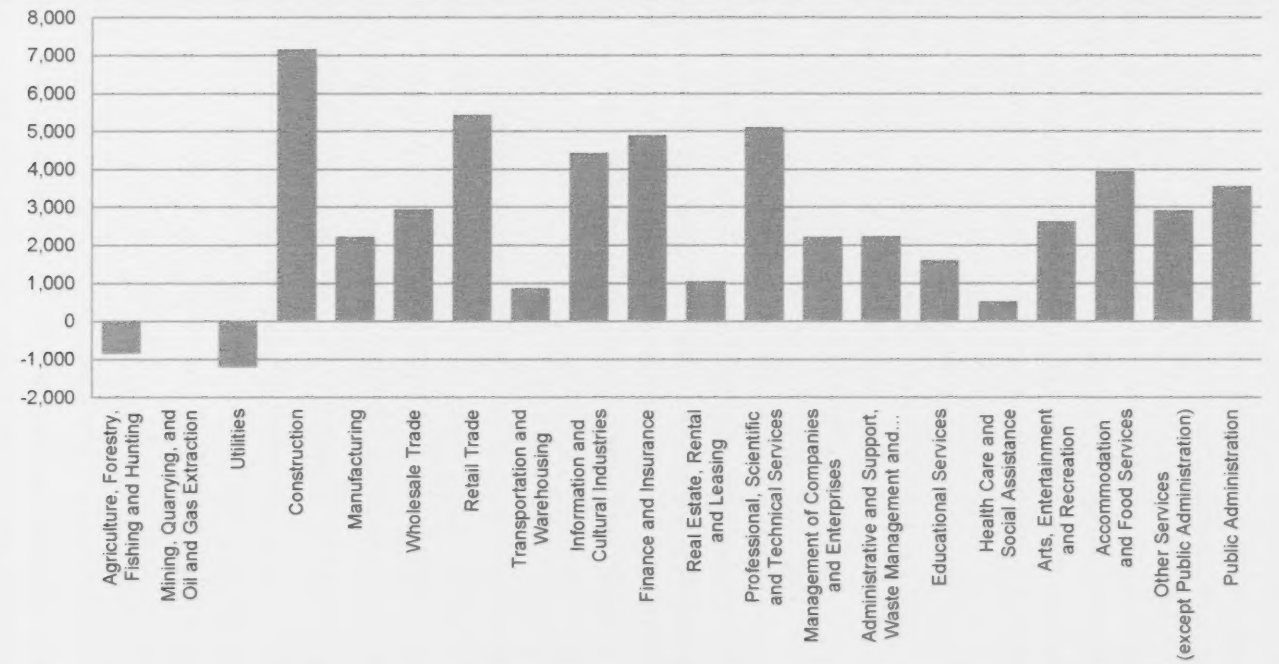


Figure 17: NAICS Sector Change 2011-2012



How the Information on Employment is Collected by the City of Toronto

The Toronto Employment Survey has successfully marked its thirtieth year. Since 1983, the Survey has been conducted to monitor economic activity, provide information for policy and decision-making and offer additional context for the planning of municipal infrastructure and services. Based on the use of a consistent coding system of parcel uses and occupant activities, it provides a rich resource of time-series data for the longitudinal analysis of employment and employment activity in the City. In 2011, for the first time in the Survey's history, employment activity was classified by NAICS (North American Industry Classification System) codes. This is an addition to the occupant activity code standard of the Regional Information Systems Working Group of the Regional Planning Commissioners Ontario, which has been used and updated over the past 30 years. The use of NAICS will enable comparison of employment activity across municipalities, provinces, and other countries.

Between May and August, a team of surveyors visit **all** business establishments located in commercial, industrial and institutional and mixed use throughout the City of Toronto. In 2012, employment data was acquired from 93.8% of business establishments that were identified. This marks an increase over 2011's response rate of 91.7%. Data collected include the number of full-time and part-time employees, the primary type of employment activity taking place, and the length of time the business has been at that location. In the case of major, multi-branch employers, the information is collected through a questionnaire mailed to the primary contact at the head office.

The result is a rich dataset which provides a valuable profile of the economic activity across the City of Toronto. This survey does not capture people who work from home, or who have "no usual place of work" e.g. contract workers, and many involved in the film industry and other activities that are not place-specific on a daily basis. These results will necessarily differ with the forth-coming results of the new voluntary National Household Survey conducted for the first time in 2011 and scheduled to be released in June 2013.

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